

MemberDirect® Small Business: MDSB Member Information and Checklist

Overview

For All Accounts (regardless of signing requirements):

- Each signer is logging into MDSB with the 19-digit Business Member Card Number
- Each signer is provided with their own unique PAC to be used for logging into MDSB
- Each signer is provided with a copy of the Member Manual and FAQ document either electronically or in print form
- Each signer must review the documents to ensure they understand the functionality of MDSB, acceptance of the Online Access Agreement acknowledgement that this has been completed

2 to Sign Accounts

- All signers must complete the upgrade to MDSB and accept the Online Access Agreement
Note: Transactions will not be permitted until this step is completed.
- All transactions require that 2 signers have reviewed the transaction before it will be processed
Example: One signer creates the transaction, a second signer approves the transaction; the transaction is then processed.
- All signers must setup Alerts to ensure they are notified when transactions require approval and/or are expiring without being approved
- Transactions not approved within the timeline, expire and are not processed
- Business/Organizations are responsible to ensure that any created transactions, have processed correctly

Signer Checklist

- Refer to the MDSB User Guide and FAQ documents for the “how to” and functionality options available
- Login to www.firstcalgary.com with credentials provided by Credit Union staff
- Review introduction information and select ‘Continue’
- Review the Disclaimer and Online Access Agreement and accept to proceed with using the application or do not accept if you do not wish to use the application
- Change your PAC from the default password provided by the Credit Union
- Set up Increased Authentication by selecting 3 security questions you wish to use and input the corresponding answers to be used when being authenticated
- Set up alert information to enable notifications to be sent to you when transactions require approval or are about to expire

